Document Search

BearBuy

Concepts

You can search for Requisitions, Purchase Orders, Receipts and Vouchers. You can perform a simple search by looking for exact document numbers or partial document numbers or an advanced search using specific search terms.

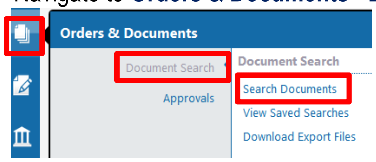
Search Terms

Document search provides a simple search interface where you can *search for the following terms across all document types* and receive *all related* Requisitions, Purchase Orders, Receipts and Invoices in the search results, such as:

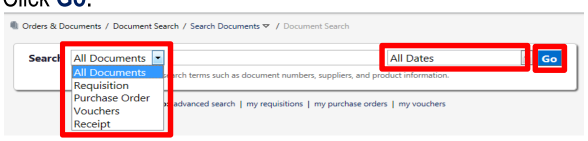
- ✓ requisition number
- ✓ requisition name
- ✓ purchase order number
- ✓ catalog number (SKU)
- ✓ contract number
- ✓ supplier invoice number
- ✓ voucher number
- ✓ receipt number
- ✓ receipt packing slip number
- ✓ supplier name
- ✓ receipt tracking number
- ✓ receipt name
- ✓ Cart name
- ✓ product description

Navigate to Document Search ➡ Simple Search

1. Navigate to **Orders & Documents> Document Search>Search Documents**

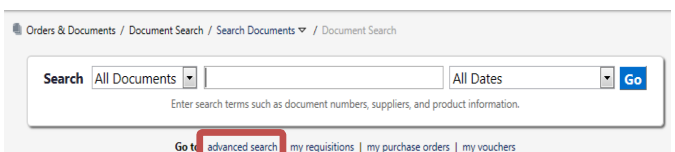


2. On the resulting window:
   a. Use **Search** ⇨ **All Documents** to specify whether you are searching **All Documents**, or specific documents such as a **Requisition**, **Purchase Order**, **Receipt** or **Voucher**.
   b. Use the **Search** field to enter information related to what you are searching for.
3. Click **Go**.



Navigate to Document Search ➡ Advanced Search

1. Navigate to **Orders & Documents> Document Search>Search Documents.**
2. Select the **advanced search** link below the search bar.

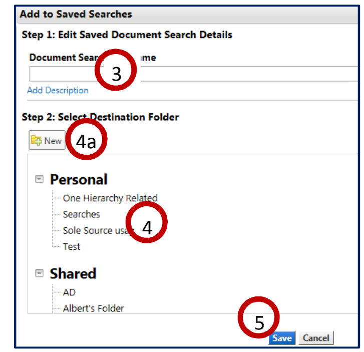


3. The **Search Criteria** includes **Requisitions, Purchase Orders, Receipts** and **Vouchers**.
   a. For each selection, the **advanced search** fields will update to show those relevant for the document type being searched.
4. There are also options for the **Custom Fields** (i.e. Fund, Buyer, Org Node Code, etc).
5. Click the **Go** button to search

Filtering your Document Search Results

1. Use the **Refine Search Results** choices to filter by criteria such as *Date Range*, *Supplier*, *User* and *Workflow* status.
   a. To select multiple values for a desired filter, click the filter icon.
   b. A pop-up is shown for the criteria being filtered.
2. Select the desired values by checking the checkbox, and then click the **Apply** button. Results are refreshed.

Saving a Document Search



1. From the **Document Search** result, navigate to the **Filtered By** section.
2. Select the **Save Search** button
3. In the pop-out window, enter a **Document Search Nickname**.
4. Select the **Destination Folder** to save the search within.
   a. To create a **new folder**, select the **New** icon.
   b. Select either **top level personal folder** or **top level shared folder**.
   c. Enter a **Destination Folder name** and **description** if needed and click **save**.
5. Click the **Save** button.

Export a Document Search

1. From the **document search** result, navigate to the **Filtered By** section.
2. Select the **Export Search** button.
3. In the pop-out window, enter **file name** and **description**.
4. Select the export template
   a. **Screen export**
   b. **Transaction export**
   c. **Full export**
5. Select the **Submit** button.
6. Your export is queued up. When ready to download, it will be located within the **Action Items top banner section**.